

Dayforce HCM Manager Timesheet Guide

Contents

- The Timesheet Management Process..... 2**
- Timesheets and Pay Approval 2
- Timesheet Overview 3
- Load the Timesheet.....3
- Timesheet Display Options4
- Grid View Options.....4
- Label Icons.....5
- Review the Timesheet5
- The View Pay Panel6
- Problem Icons7
- Timesheet Reports7**
- Resolve Timesheet Problems..... 8**
- Add Time to the Timesheet 10
- Add Missing Punches..... 11
- Remove Unworked Shifts 13
- Add Pay Adjustment 15
- Add a Shift Transfer 16
- Authorize Time 17**
- Authorize Shifts 17

Dayforce Manager Timesheet Guide

The Timesheet Management Process

There are four key steps involved in timesheet management. They are:

- Review the Timesheet
- Resolve Time sheet Problems
- Authorize Time

Timesheets and Pay Approval

Dayforce tracks employee time and attendance using **Timesheets**, making it easier for managers to review time and detect exceptions. Employees might add their own time and attendance data into Dayforce (e.g. by punching in with a punch clock) or managers may add this information on their behalf. It is the manager's job to monitor the timesheets for their location(s) to ensure that time and attendance information is accurate. This is very important because Dayforce Payroll uses the data from employee timesheets to calculate their pay!

As a manager, you will use the **My Timesheets** page to (**reminder, "Employee Timesheet" is the manager's time sheet*):

- Monitor attendance
- Add/Edit time and correct problems
- Add pay adjustments
- View pay information
- Authorize time
- Run timesheet reports

The screenshot displays the 'My Timesheets' interface for Store 1, covering the period from 7/6/2014 to 7/12/2014. The interface includes a navigation bar with options like 'My Day', 'My Schedules', 'My Timesheets', 'My HR', 'My Work', 'Me', and 'My Benefits'. Below the navigation bar, there is a toolbar with various actions such as 'Select Manager', 'Load', 'Save', 'Reports', 'Print', 'View', 'Filter', 'Sort', 'Authorize', 'Unauthorize', 'View Pay', 'Balance', and 'Attendance'. The main content area is a grid with columns for each day of the week (Sunday, Jul 06 to Saturday, Jul 12) and rows for individual employees: Henry Leonardo, Ida Barnes, and Jerry Yacobi. Each cell in the grid shows the employee's name, their role (e.g., Customer Service C, Sales Associate), and their scheduled shift times. For example, Henry Leonardo is scheduled for Customer Service C from 1:00p to 5:00p on Tuesday, Wednesday, Thursday, and Friday, and from 1:00p to 5:00p on Saturday. The grid also shows time entries for each day, with some cells containing a green checkmark and a clock icon, indicating that time has been recorded for that shift.

Note: if Schedules are used- The shifts that display in **My Timesheets** are based on the scheduled shift information in **My Schedules**.

Dayforce Manager Timesheet Guide

Timesheet Overview

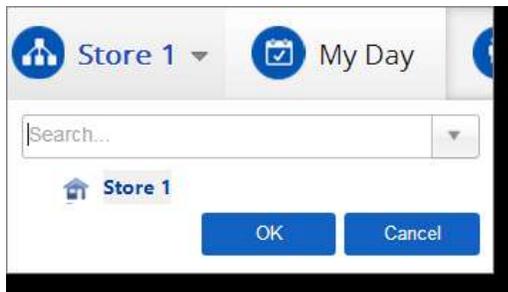
This section provides details on how to load the correct timesheet, read information on the timesheet and toggle timesheet display options.

Load the Timesheet

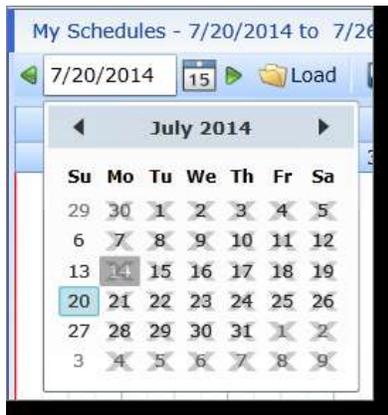
Path: **My Timesheets** > [Select Location] > [Select Date] > **Load**

My Timesheets is where all timesheet data is recorded. Timesheets are organized by location and date.

Use the **Org Picker** on the **Navigation Bar** to select the location. Click on the location at the upper left side of the screen, and a drop down will appear with all of the locations that are assigned. If there are multiple locations, click on the plus (+) sign next to each one to open the cost center desired.



Imagine! timesheets have been configured to automatically load the current week, beginning on Monday, for the selected location. If it does not, click **Load** after a date is selected.



Select the date for the week you'd like to view. To navigate the calendar:

- Scroll to the next or previous week using the green arrows.
- Select the week you'd like using the calendar tool.
- Type the start date for the week you wish to view into the date box.

Once the date has been selected, click **Load** to load the schedule into the workspace.

Note: Imagine! timesheets are loaded by desired week beginning on each Monday at 12:00 a.m.

Dayforce Manager Timesheet Guide

Timesheet Display Options

Path: My Timesheets > [Load the Timesheet]

Employee	Sunday, Jul 06	Monday, Jul 07	Tuesday, Jul 08	Wednesday, Jul 09	Thursday, Jul 10	Friday, Jul 11	Saturday, Jul 12	Total
Henry Leonardo			Customer Service C 1:00p 1:00p 5:00p 5:00p 7:50 7:50	37.50 37.50				
Lisa Barnes			Sales Associate 12:00p 12:00p 3:00p 3:00p 7:50 7:50	37.50 37.50				
Jerry Hobbs			Customer Service C 9:00a 9:00a 12:00p 12:00p 5:00p 5:00p 7:50 7:50	37.50 37.50				

Once loaded, the timesheet lists employees against the days of the week. **You may change the “view” of the time sheets by clicking on “View” in the top row. The “grid” view is recommended (See “Grid View Options” below).**

Each cell represents a single time and attendance record for a specific employee and date. **When reviewing “hourly” employee time sheets**, each cell represents the employee’s work times and position. Dayforce sums the shift’s hours and the **total weekly totals reflect the “hours worked”** and will not reflect non-worked hours such as sick, vacation or non-worked holiday hours (unless there is a problem with the shift’s details that prevents the application from adding up the hours).

Actual punch in/out times may be viewed as **“raw punches”**. To see “raw” punches, highlight the time sheet/s that you wish to see and click on the button “Punches” (clock icon) at the top, right side of the screen.

Raw Punch Time	Actual Time
This is the exact time that an employee punched in for work as recorded by the clock.	This is the punch time displayed on the timesheet. Dayforce takes the Raw Punch Time, applies rules to it, and displays the rule-adjusted time. The Actual Time is the time record that Dayforce Payroll will use to calculate employee pay.

Grid View Options

Path: My Timesheets > [load timesheet] > View > Grid View Options

After loading a timesheet you can switch between three levels of display details.

Click **View** to display the **Options** panel.

Grid View Options

Level of Detail
Low High

Display Position As
Department Name Job Name ▼

General Options

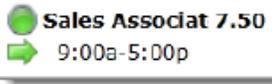
Autoload on Start

Show problem pane after timesheets are loaded

View totals in hours:minutes

Dayforce Manager Timesheet Guide

Adjust the **Level of Detail** slider bar to the desired level.

Level of Detail	Cell View	Description
High	 <p>Sales Associate 9:00a 9:00a 12:00p 12:00p 12:30p 12:30p 5:00p 5:00p 7.50 7.50</p>	Displays both the scheduled times and actual times for an employee. Includes both shift start/end times and meal start/end times.
Medium	 <p>Sales Associat 7.50 9:00a-5:00p 12:00p-12:30p</p>	Displays the actual time the employee punched in and out and their actual meal times.
Low	 <p>Sales Associat 7.50 9:00a-5:00p</p>	Displays the actual time the employee punched in and out.

View totals in hours: Displays the total hours scheduled in the hours: minutes format.

Label Icons

As you edit and make adjustments to the timesheet, the application displays additional icons to label the kinds of edits made.

Icon	Icon Description	Definition
	Blue arrows	A job transfer has been made during the shift.
	Office building	Shifts worked or scheduled in a different location.
	Hourglass	The pay adjustment was recorded in hours.
	Silver coin	The pay adjustment was recorded in dollars.
	Authorize icon	You or another manager has authorized the time and attendance records on the shift.

PLEASE NOTE: Imagine! recommends that as “best practice” both employees and managers use the “Time Away” request program rather than manually entering the non-worked hours onto the time sheet. When the request goes to the manager, they may approve, edit or decline. If the employee is either on a “schedule” or is salaried, when approving, it is recommended that the manager “edit” the request and select “fill schedule” so the hours automatically populate within the time sheet. If the “fill schedule” is not selected, the hours may still populate on the time sheet, but they will not override the scheduled hours.

Review the Timesheet

Path: **My Timesheets** > [Load the Timesheet]

Dayforce Manager Timesheet Guide

Managers must review timesheets regularly to ensure their accuracy and to detect any problems.

Note: Imagine uses punch policies which include rounding rules. For example, if an employee punches in at 7:59 am, rounding rules display the punch time as 8:00 am.

The View Pay Panel

Path: **My Timesheets** > **[Load the Timesheet]** > **View Pay**

The time and attendance data from the timesheet is used by Dayforce Payroll to calculate employee paychecks. Therefore, it is important to preview employee pay in **My Timesheets** before approving it for the pay run. Pay-related problems that might occur on the timesheet include:

- Employee hours are calculated incorrectly
- Pay is classified under the wrong pay code (For example, an employee should receive sick pay but instead receives regular pay)
- An employee worked at a different location or position for a shift

You can look up and review your employees' pay summaries for each week using the **Pay Panel**. Click **View Pay** to open the Pay Panel. The pay summary has two main tabs: **Weekly** and **Daily**.

Date	Location	Department	Job	Docket	Qty	Amount	UNPAID	REG	OT	PREM	BEN	VAC
Week 1 (Pay calculation week from 7/13/2014 to 7/19/2014)												
Tue Jul 15	Store 1	Sales Sales	Associate [None]		0.00	\$96.25	0.50	7.50				
Wed Jul 16	Store 1	Sales Sales	Associate [None]		0.00	\$96.25	0.50	7.50				
Thu Jul 17	Store 1	Sales Sales	Associate [None]		0.00	\$96.25	0.50	7.50				
Fri Jul 18	Store 1	Sales Sales	Associate [None]		0.00	\$96.25	0.50	7.50				
Sat Jul 19	Store 1	Sales Sales	Associate [None]		0.00	\$96.25	0.50	7.50				
Total					0.00	\$491.25	2.50	37.50				

The **Weekly** tab displays pay details for each day the selected employee worked during the week. This view sorts pay information by day; where each day displays:

- The employee's work location and position
- Number of hours worked per day
- How the time is categorized by pay category
- How much the employee was paid

Start	Time	End	Time	Location	Position	Code	Category	Rate	Hours	Amount	Do
Tue Jul 15	1:00 PM	Tue Jul 15	5:00 PM	Store 1 Sales	Sales Associate	WRK	Reg	\$13.10	4.00	\$52.40	
Tue Jul 15	5:00 PM	Tue Jul 15	5:30 PM	Store 1 Sales	Sales Associate	MEAL	Unpaid	\$0.00	0.50	\$0.00	
Tue Jul 15	5:30 PM	Tue Jul 15	9:00 PM	Store 1 Sales	Sales Associate	WRK	Reg	\$13.10	3.50	\$45.85	

The **Daily** tab displays pay details for the exact employee and day highlighted in the timesheet. This view organizes pay information by hours spent per pay code; where each code displays:

Dayforce Manager Timesheet Guide

- Start and end time for that pay code
- Location and position
- Pay code
- Pay category
- Rate
- Total hours worked
- Total amount per pay code

Problem Icons

When there are discrepancies on an employee's time and attendance records, the application displays one of the three following problem icons that represent the problem severity on the timesheet:

Icon	Icon Description	Definition
	Error	Errors are critical problems that must be corrected.
	Warning or Exception	Warnings might be useful to know about, but typically do not have to be corrected.
	Information	Represent information that is useful to know, but does not need to be corrected.

Timesheet Reports

Path: **My Timesheets > Reports**

Running Timesheet Reports is another way to efficiently identify problems on the timesheet. Some commonly used timesheet reports include:

Name	Description
Employee Pay Summary Report	Displays a pay summary for multiple locations at once.
Employee Punch Report	Displays a summary of employee punches and worked time. It lists who punched in and out for work, and when, during the selected time period.
Pay Summary Report	Displays payroll data for each employee in wages and includes the amount of hours employees worked in each pay category.
Raw Punch Report	Displays the raw punch data for employees (when they actually punched in) as well as their actual punch times (the time that shows up on the timesheet when Schedule Rules are applied), scheduled times, and exceptions.
Timesheet Audit Report	List all changes made to your time and attendance records.

Dayforce Manager Timesheet Guide

Resolve Timesheet Problems

Path: **My Timesheets** > [Load the Timesheet]

Now that you've found some problems on the timesheet, it's time to fix them. This section describes how to:

- Modify other details about the shift (i.e. change locations or position)
- Add a shift transfer
- Add missing punches
- Remove unworked shifts (i.e. an accidental punch in)
- Correct early or late punches
- Make a pay adjustment (i.e. add "sick", "vacation", etc.)

Note: This guide covers how to deal with many timesheet issues, but does not cover all possibilities. The errors you see and the corrections you need to make will depend on your role.

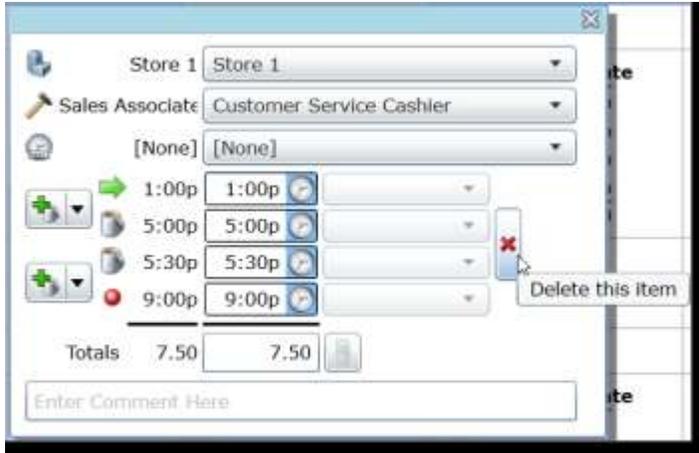
Icon	Description	Definition
	Add Shift icon	A new row is added to the employees' schedule with the additional shift.
	Edit Shift icon	Edit any of the fields on the Shift window.
	Delete Shift icon	Remove the shift from the schedule.

Select the shift and click **Edit**.



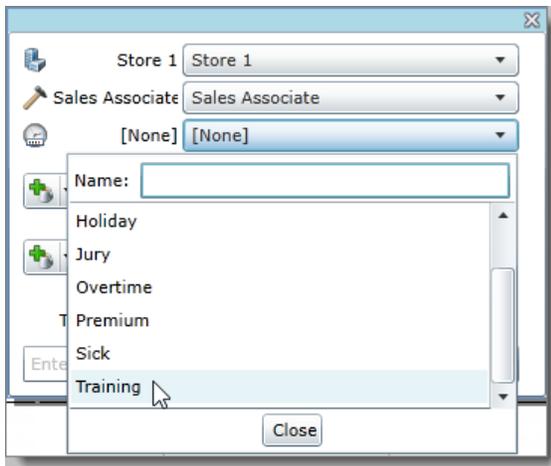
The **Edit Shift Window** is displayed. Choose an alternate **Location** or **Position** for the shift from the drop-down menus.

Dayforce Manager Timesheet Guide



Click **Delete** next to the meal Start and End times to delete the break. Modify the Start time or End time to change the length of the shift.

Override the pay code in the shift to indicate that the employee worked on a different task than his or her regular work.



In the example above we are selecting 'Training' to indicate that the employee attended training for the entire shift.

Close or click outside of the window to add the punches to the timesheet.



Click **Save** when finished.

Dayforce Manager Timesheet Guide

Add Time to the Timesheet

Path: **My Timesheets > Add New Shift**

Employees may work extra hours that do not appear on their schedule or timesheet. In this case, the manager can add extra punches to the timesheet on a day without a scheduled shift.

Scenarios where this might occur:

- An employee picks up extra hours outside of their regularly scheduled shifts
- An employee is called in to help on short notice

How to detect the problem:

- Neither the shift nor the hours have been entered into Dayforce, so the manager must find the empty shift on the schedule manually



Select the shift and click the **Add Shift** icon.



The **Add Shift** window is displayed. Add the Start, End, and Break times by typing in the times and clicking the **green check mark** icon beside each time. Ensure that the **location, position,** and break times are correct. Close or click outside of the window to add the shift to the timesheet.

Dayforce Manager Timesheet Guide



The **Worked (not scheduled)** icon is displayed at the top of the cell to indicate that this shift was added to the timesheet but did not originally appear on the schedule.

Add Missing Punches

Path: **My Timesheets > Problems**

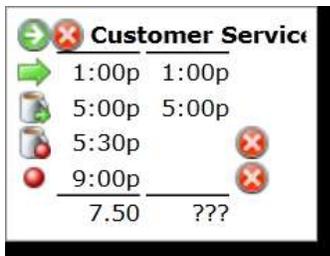
Employees occasionally forget to punch in or out from their shift. Managers must correct the timesheet when this occurs to eliminate errors.

Scenarios where this might occur:

- An employee forgets one or more punches throughout the day, but at least one punch is registered on the timesheet

How to detect the problem:

- Depending on the policies configured, an **Error** is displayed when punches are missing from the timesheet
- Use the Problems panel to locate the error



There are two ways to correct this problem:



Dayforce Manager Timesheet Guide

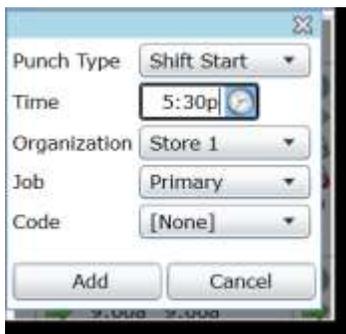
- Add New Punches
- Use the Edit Icon

Add New Punch(es)

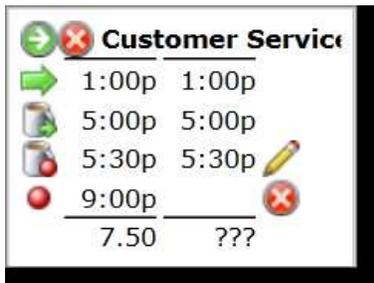
Path: **My Timesheets** > [select shift] > **Add New Punch(es)**

This option adds a single punch to the timesheet.

Select the problem shift and click on the drop-down menu beside the **Add Shift** icon. Click **Add New Punch(es)** from the list.



The **Add Punches window** is displayed. Select the **Punch Type** to indicate which punch you are adding to the timesheet. Specify the time of the punch and other parameters (such as location and job). Click **Add** to add the punch to the timesheet.



The **Edit** icon appears beside the punch to indicate that it was added by the manager. **Save** when finished.

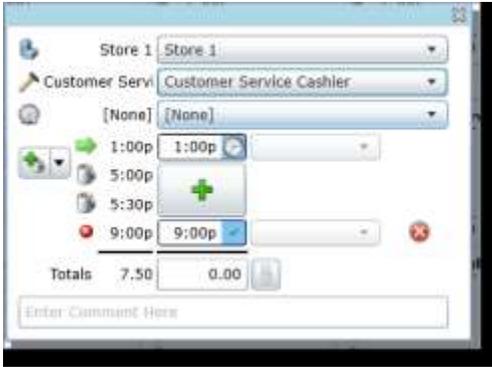
Edit Icon

Path: **My Timesheets** > [select shift] > **Edit**

This option adds either a single punch or multiple punches to the timesheet.

Select the problem shift and click on the **Edit** icon. The **Edit Shift** window is displayed.

Dayforce Manager Timesheet Guide



Modify the shift End time as necessary and click the **green check mark** to save the change. Click the **Add** icon beside the meal times to add a break that matches the scheduled one. Close or click outside of the window to add the punches to the timesheet.



The **Edit** icon appears beside the corrected punches to indicate that they were added by the manager. **Save** when finished.

The **Add Shift** window is displayed. The scheduled times for the shift appear as the default but may be modified if needed. Close or click outside of the window to add the punches to the timesheet.



Click **Save** when finished.

Remove Unworked Shifts

Path: **My Timesheets** > [select shift] > **Delete Shift**

If an employee punches in on a day where no shift is scheduled, the punch will appear on the timesheet as a problem punch. Managers must remove this punch from the timesheet to correct the problem.

Dayforce Manager Timesheet Guide

Scenario where this might occur:

- An employee comes to work on the wrong day, punches in, realizes their error, and leaves again

Select the shift and click the **Delete** button.

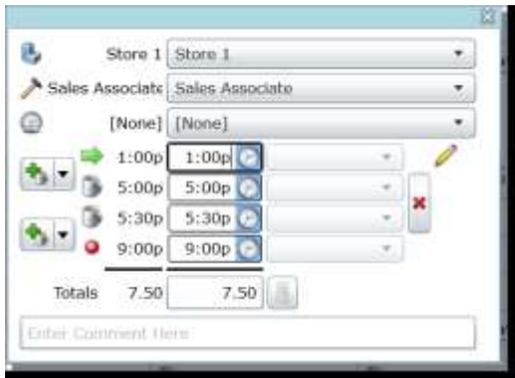


The punch is removed from the schedule.
Click "Save".

Adjust Time

If the manager knows that an employee did work the whole shift but punched at the wrong time, the actual start time can be adjusted. This removes the late punch from the employee's attendance record and pays them for the time missed.

Select the shift and click the **Edit** icon.



Edit the shift start time by typing in the **Start time** field or using the **green arrows**.



The employee's time worked is now as long as it should be according to the schedule. The **Edit** icon appears beside the modified punch.

Dayforce Manager Timesheet Guide

Add Pay Adjustment

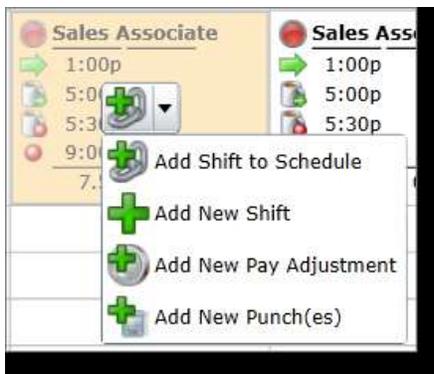
Path: **My Timesheets > Add New Pay Adjustment**

Pay Adjustments allow managers and administrators to pay employees without adding punches to the timesheet. They can be used to account for employee absences such as vacation, sick time, or to pay additional premiums such as training or special assignments.

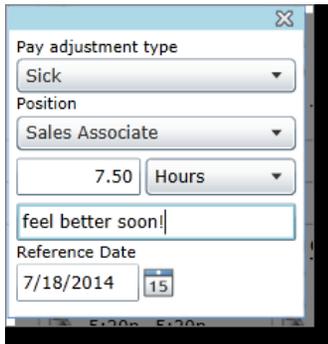
Pay adjustments can be made:

- **In Hours** – The adjustment is applied for a specified number of hours during the shift

To add a pay adjustment to a shift, select the shift and click the drop-down menu beside the **Add Shift** icon.



Click **Add New Pay Adjustment**.



The **Pay Adjustment** window is displayed. Select the desired **Pay adjustment type** and **Position** for the employee. In this case, the employee was sick.

Enter the number of **Hours** that the employee will be paid (or change to the desired dollar **Amount** instead using the drop-down menu). Any comments or a reference date for the change pay also be entered.

Close or click outside of the window to add the adjustment to the timesheet. The way the adjustment appears on the timesheet depends on the type of shift it was added to:

Dayforce Manager Timesheet Guide

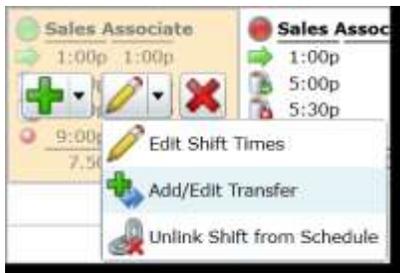
Add a Shift Transfer

Path: **My Timesheets > Add/Edit Transfer**

A **Shift Transfer** is used to manipulate the labor allocation (Cost Center) within a shift. For example, if an employee has multiple work assignments on their HR Record, they might work part of a shift in one position and then switch to another position for the second half of the shift. You can also record transfers to change the pay code for part of or the entire shift or assign docket and projects.

Scenarios where this might occur:

- An employee worked part of a shift at one position and part of a shift at another position
- An employee worked part of a shift at one location and part of a shift at another location
- An employee took time out of their shift to attend training



Select the shift and click the drop-down menu beside the **Edit** icon. Select **Add/Edit Transfer** from the list.

	Location	Position	Pay Code	Docket	Qty	Comment
1:00p	Store 1	Sales Associate	[None]	[None]	[None]	
9:00p						

The **Transfer window** displays the shift start and end times, location, and position that this shift falls under by default.

	Location	Position	Pay Code	Docket	Qty	Comment
1:00p	Store 1	Sales Associate	[None]	[None]	[None]	
5:00p	Store 1	Customer Se	[Same]	[Same]		help on cash
9:00p						

Click the **Add** icon to record the transfer details, including:

- Position change start time
- Location
- Position
- Pay Code
- Any comments you would like to add

Dayforce Manager Timesheet Guide



If the transfer is for a couple of hours in the middle of the shift, you need to add an additional transfer line back to the original shift once the transfer assignment is finished.



Close or click outside of the window to add the transfer to the timesheet. The transfer icon is displayed at the top of the cell beside the status icon. Click **Save** when finished.

Authorize Time

Once the timesheets are complete and accurate, the manager authorizes the timesheets so that Payroll can use them to calculate pay.

Authorize Shifts

Authorization is typically used to record that you have reviewed the timesheet and all changes are complete.

To authorize a shift, select the desired shift and click **Authorize**.



The **Authorized** icon is displayed next to the shift status. You can undo this action by clicking **Unauthorize** before you save. To authorize multiple shifts at the same time, use one of the following actions:

- Authorize all of an employee's records for the week by clicking the employee's name.
- Authorize all records on a specific day by clicking the date.

Dayforce Manager Timesheet Guide

- Authorize a block of shifts by clicking and holding the mouse button on the first shift, then dragging it to highlight the area over the shifts you want to select.
- Authorize specific shifts by holding **Ctrl** and clicking the desired shifts.



The screenshot displays a grid of shifts in the Dayforce Manager Timesheet. The grid is organized into three main sections: Customer Service, Training, and Sales Associate. Each section contains four columns of shift blocks. The Customer Service section at the top shows shifts from 1:00p to 9:00p. The Training section in the middle shows a single shift block for 7:50. The Sales Associate section at the bottom shows shifts from 9:00a to 5:00p. Each shift block includes a role icon, the role name, start and end times, and a numerical value (7.50) at the bottom.

Customer Service 1:00p 1:00p 5:00p 5:00p 5:30p 5:30p 9:00p 9:00p 7.50 7.50			
Training 7.50			
Sales Associate 9:00a 9:00a 12:00p 12:00p 12:30p 12:30p 5:00p 5:00p 7.50 7.50			
Customer Service 9:00a 9:00a 12:00p 12:00p 12:30p 12:30p 5:00p 5:00p 7.50 7.50			

Click **Save** once all shifts are authorized.